Updating a Recurring DMS Payment

Last Modified on 10/15/2025 3:28 pm EDT

Donor Management System

After adding a recurring DMS Live Payment, you can easily update the donor's billing information and a few other details anytime.

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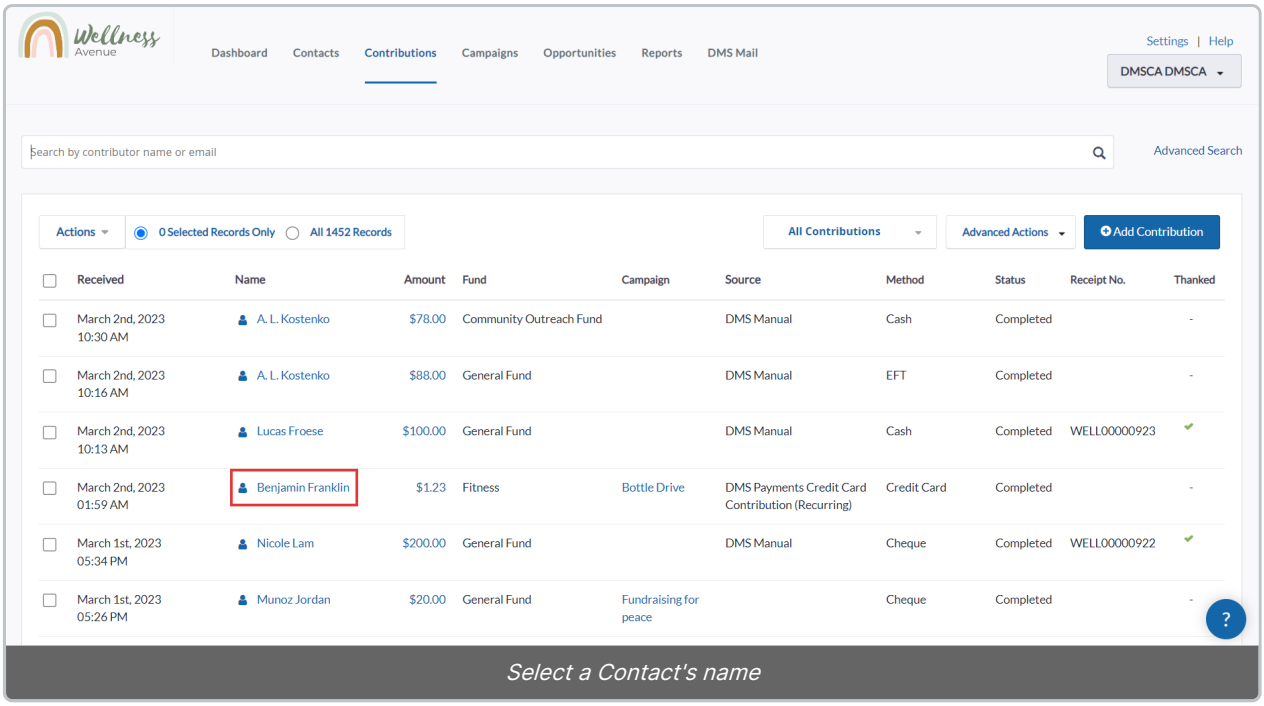
Considerations

- At this time, if you need to update the ***amount*** or ***frequency*** for **either a credit card or EFT** recurring payment, you'll simply need to **cancel it** and **set up a new live payment** reflecting the desired changes.
- Currently, you can only **update billing information** for a live payment made **via credit card**.
  - To change a donor's **bank account details** (for EFT live payments), you'll need to login to your iATS Portal directly.
- For security reasons, you can only update one recurring DMS Payment at a time.

Identifying the Recurring DMS Payment

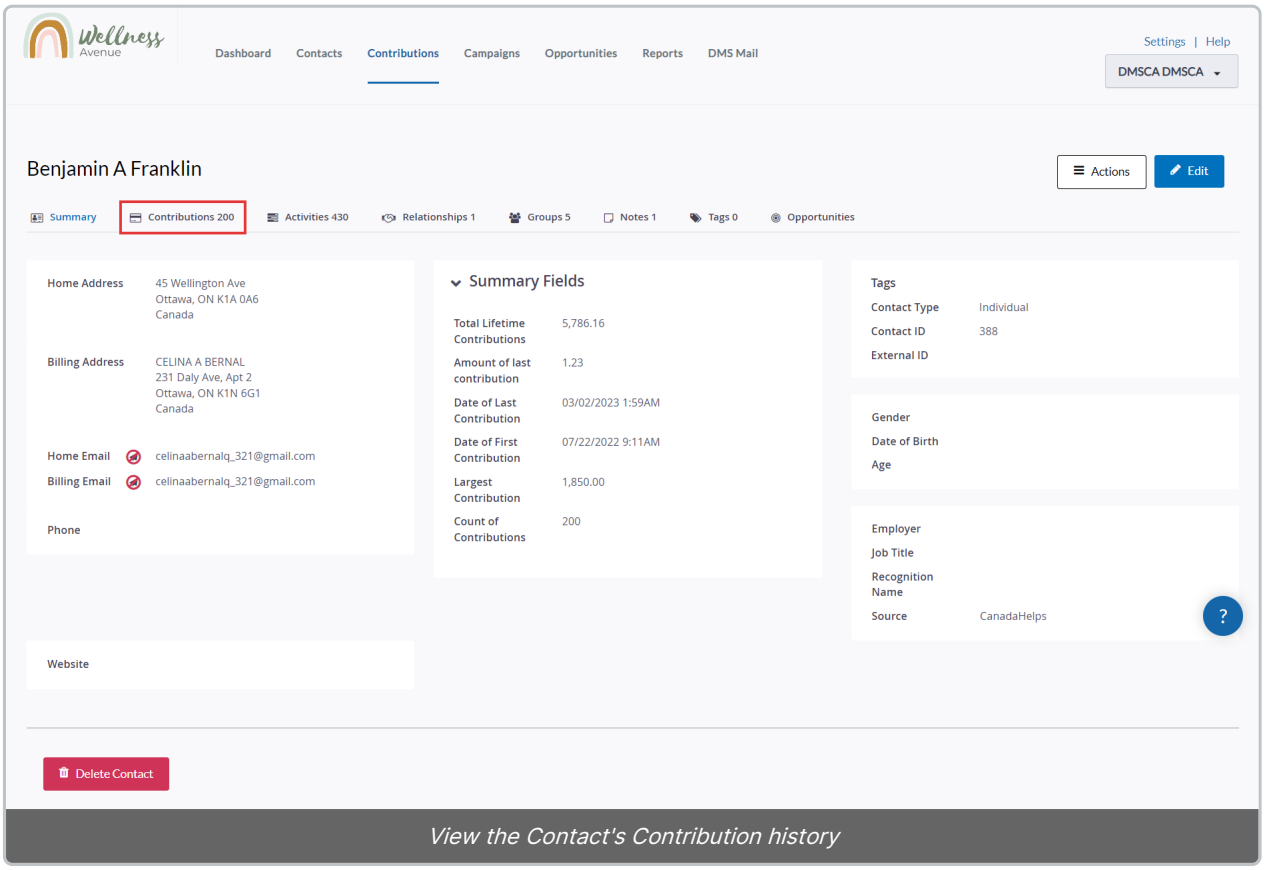
1. Visit the **Contributions Tab**

2. **Search for the recurring DMS Contribution** you wish to update and **select the Contact's name**



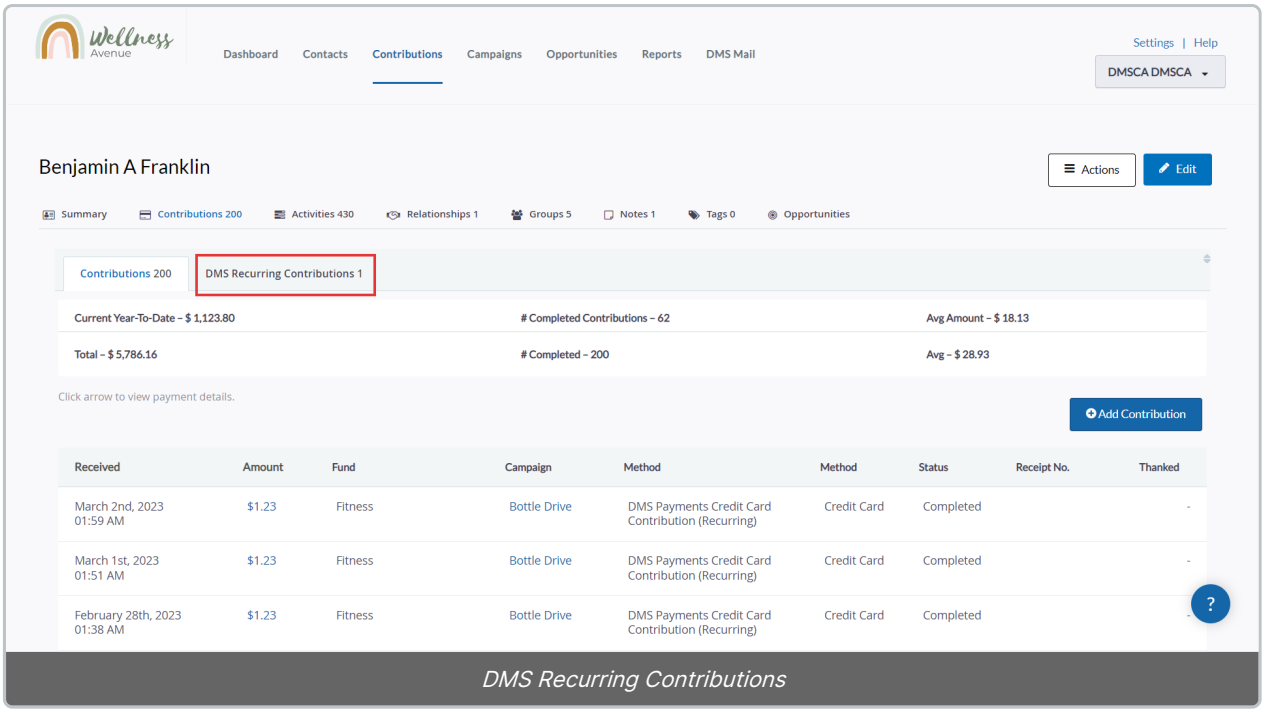
Select a Contact's name

4. You will be directed to the Contact's Profile. From there, select***Contributions***



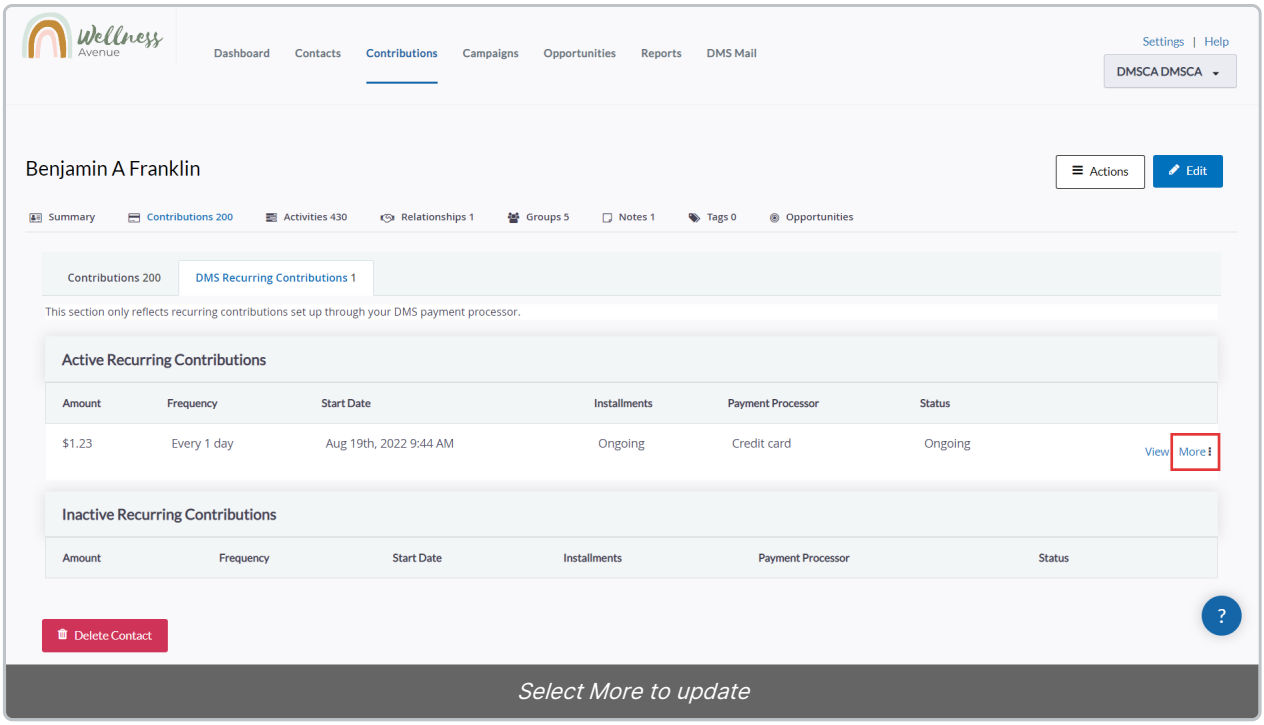
View the Contact's Contribution history

5. You will see a list of all the Contributions associated with that Contact. Then, select***DMS Recurring Contributions***



DMS Recurring Contributions

6. Identify the Contribution you wish to update and select ***More***



Select More to update

7. Afterwards, you'll be able to:

    a. Cancel the DMS Recurring Contribution,

    b. Update its billing details (for credit card payments)

    c. Update a few other Contribution details (see below)

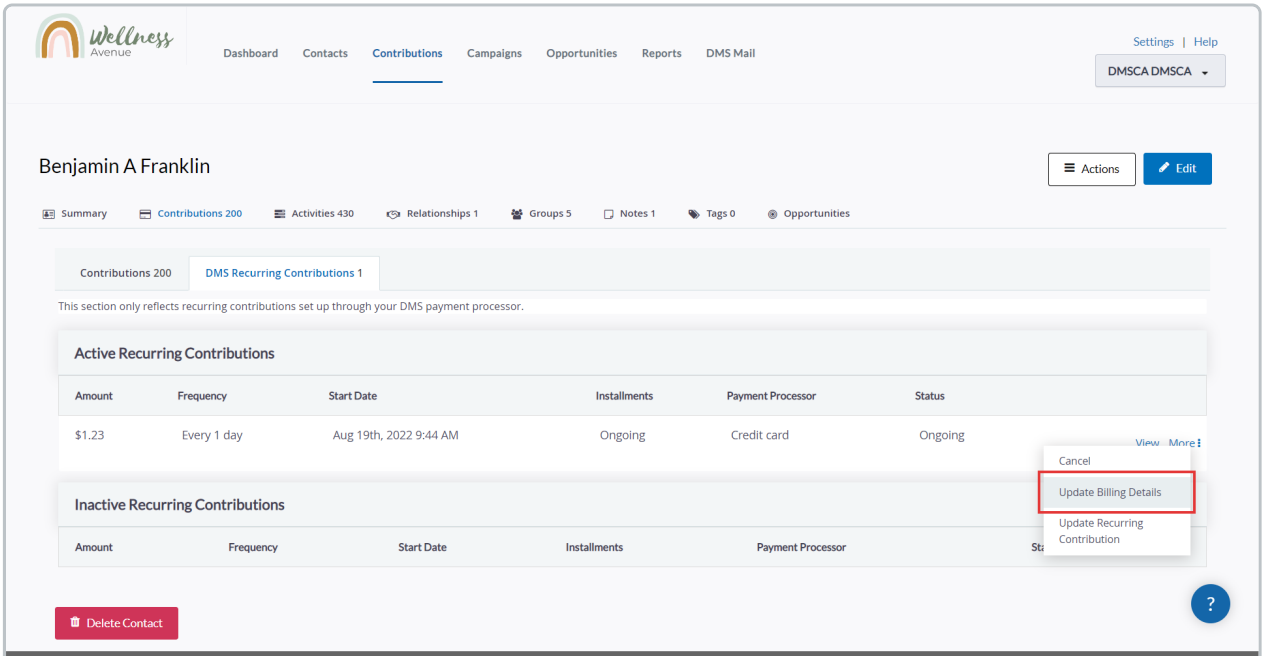
Updating Billing Details

This section will highlight how you can change the billing information for a donor's recurring**credit card live payment**.

> **Reminder:** To change a donor's **bank account details** (for EFT live payments), you'll need to login to your iATS Portal directly.

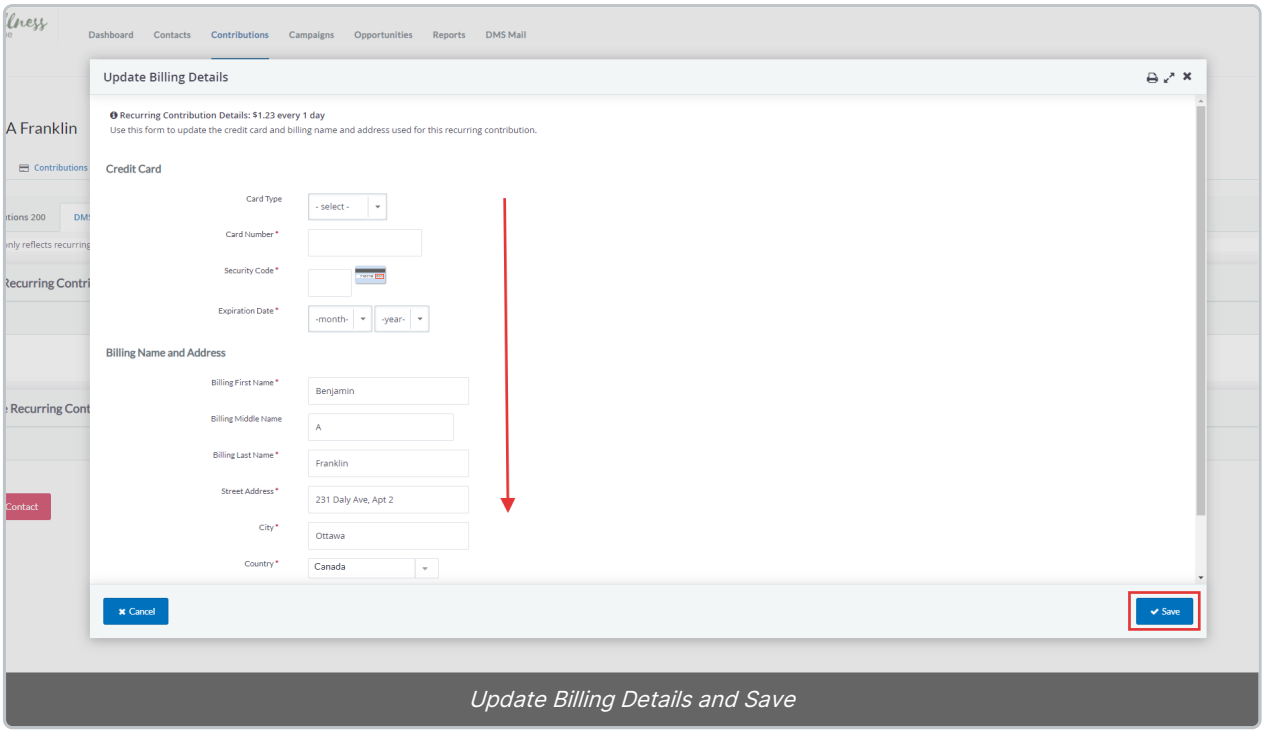
1. Identify the DMS Recurring Contribution you're looking to update the billing details for

2. Once you've identified the Contribution, click *More*, then select ***Update Billing Details***



Update Billing Details

3. On the next page, **you'll be able to update the Contact's Payment Method** as needed and ***Save***.



Update Billing Details and Save

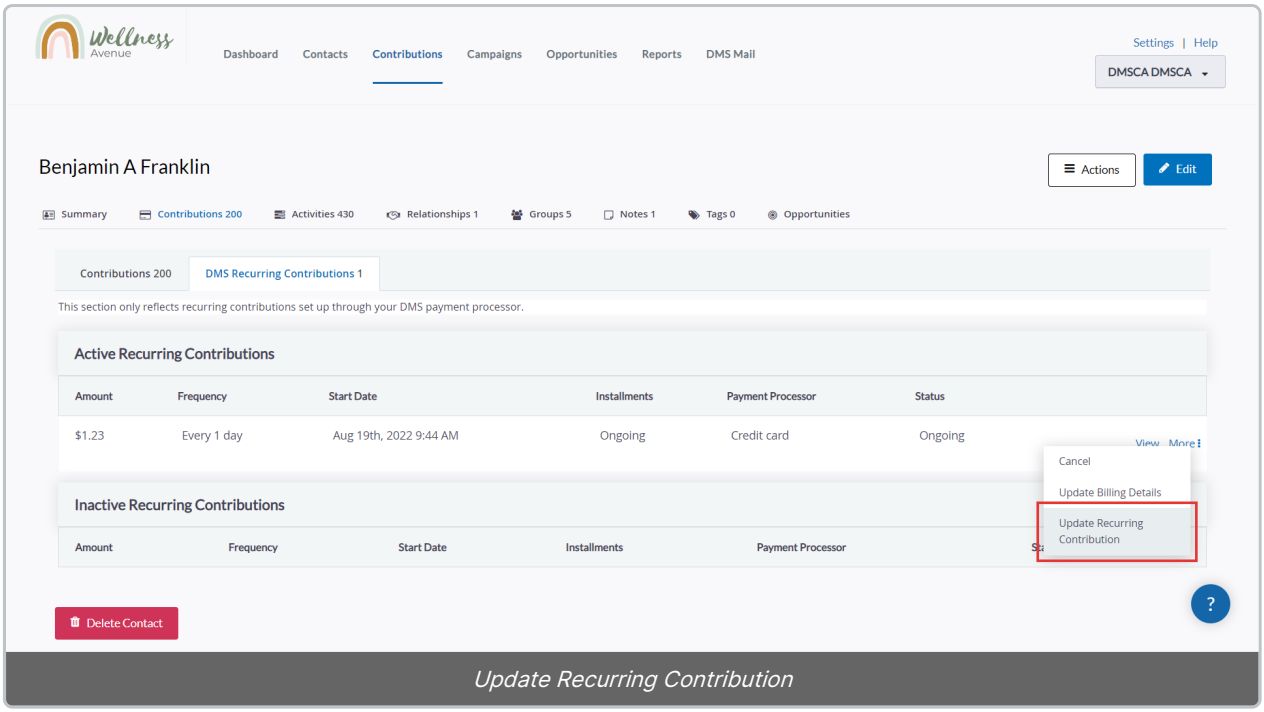
Reminder: Credit card **expiry dates don't automatically update** in the DMS. For any expired credit cards, you'll need to update the billing details manually following the steps above.

Tip: Want to know which DMS payments have credit cards that will expire soon?**Learn more**!

Updating Other Details

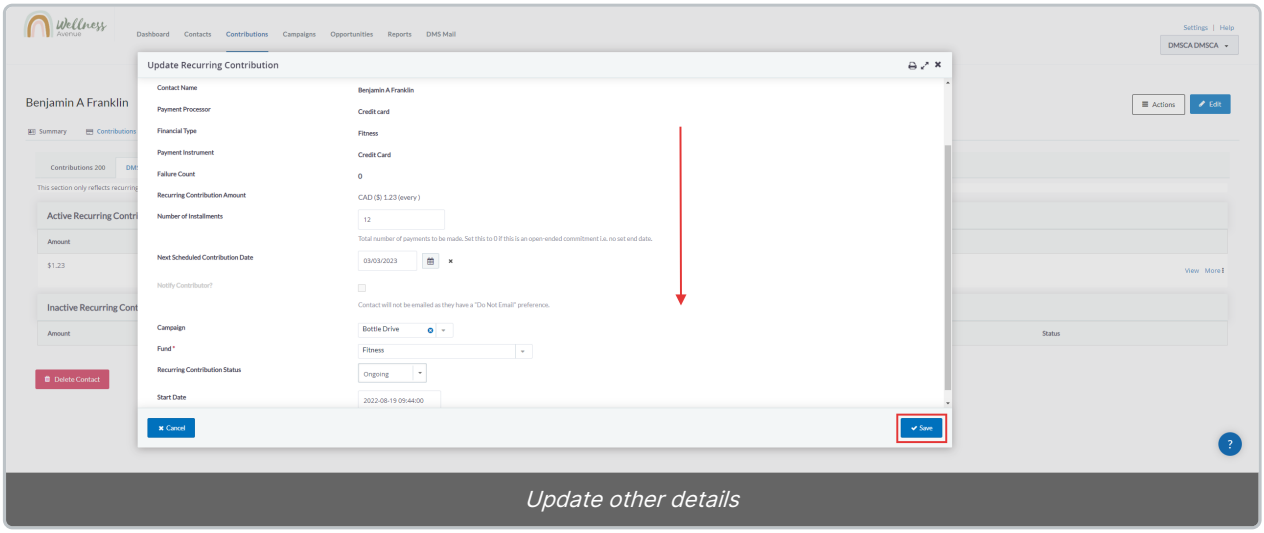
1. **Follow the steps above** to identify the DMS Recurring Contribution you wish to update the additional details for

2. After selecting ***More***, select ***Update Recurring Contribution***



Update Recurring Contribution

3. On the next page, you'll be able to update the**following fields,** and select ***Save*** when you're done**.**



Update other details

- ***Number of Installments:*** Total number of payments to be made. Set this to 0 if this is an open-ended commitment i.e. no set end date.
- ***Next Scheduled Contribution Date:*** when you would like the next payment to be made by the donor.
- ***Notify Contributor:*** you can notify the Contact/donor of these changes.
- ***Campaign:*** the Campaign associated with this donation.
- ***Fund:*** the Fund this donation is going into.
- ***Status:*** whether DMS Payments has been Cancelled, Completed, etc.
- ***Start Date:*** when the payments will start. You can only select a date from the time you're adding this Online Contribution or a future one.

4. **If you decide to notify the Contact of these changes** , they'll receive an email notification mentioning the changes you've made to their DMS Payments.

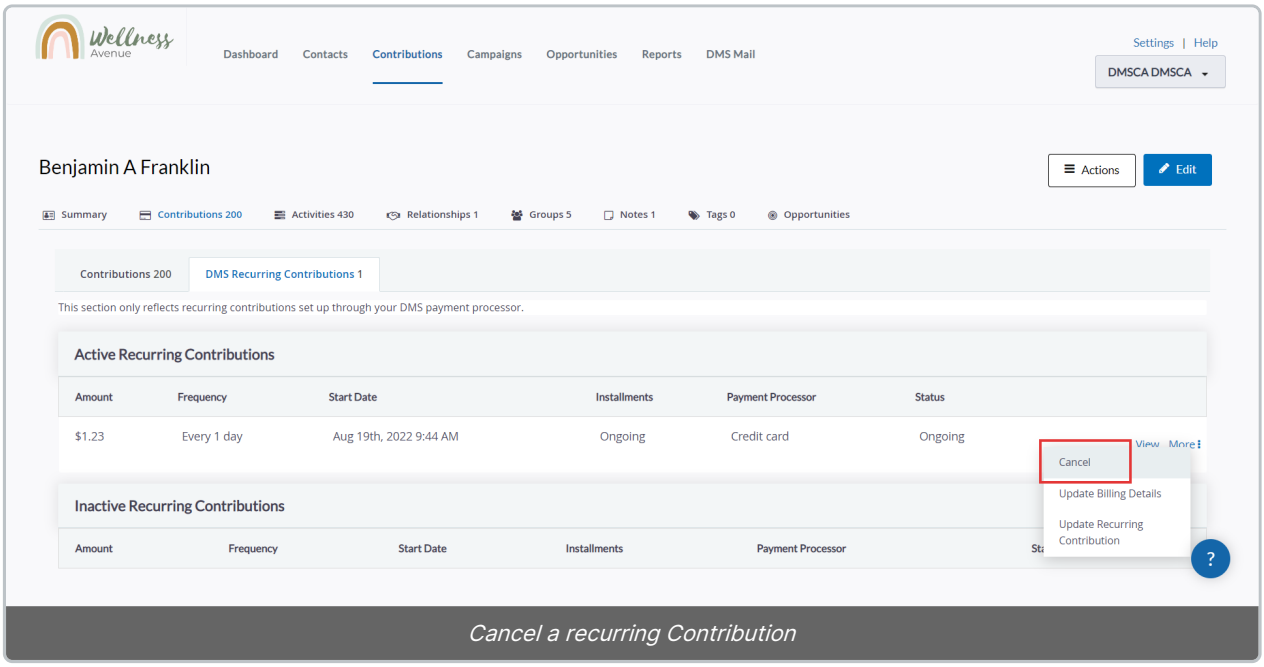


Email notification to Contact

Cancelling a Single DMS Recurring Contribution

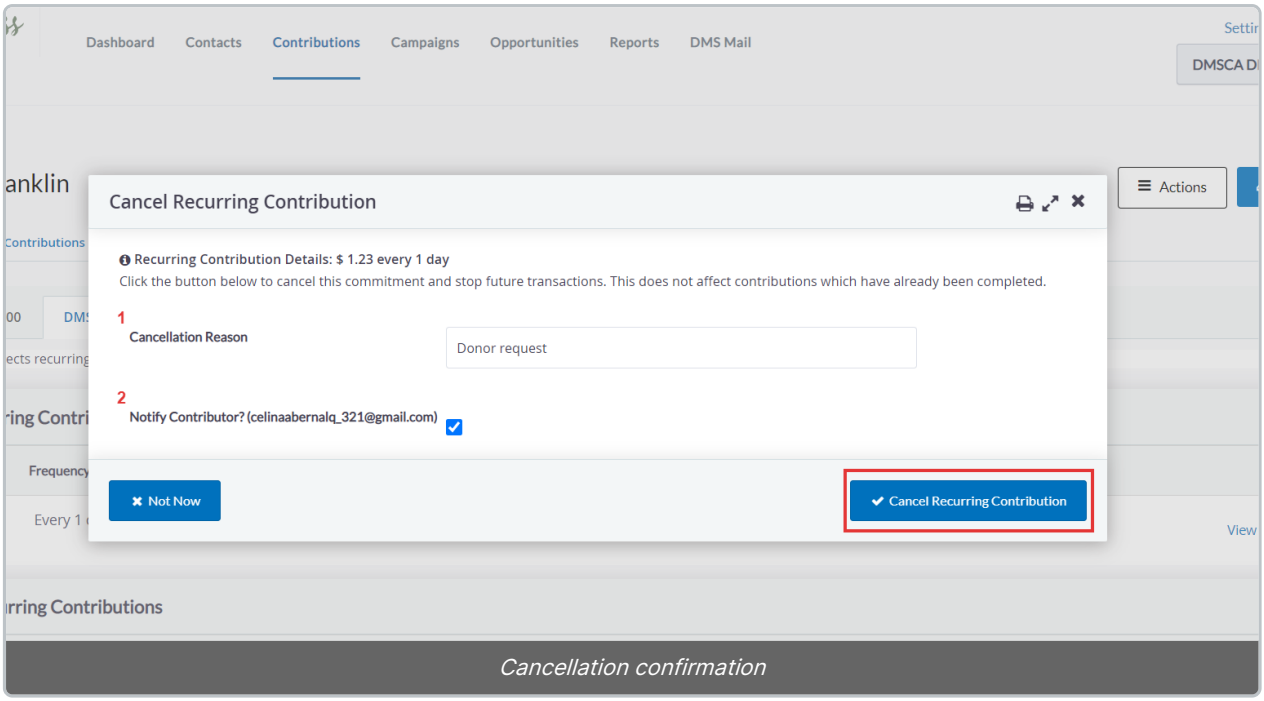
1. **Follow the steps above** to identify the DMS Recurring Contribution you're looking to cancel

2. After selecting ***More***, select ***Cancel***



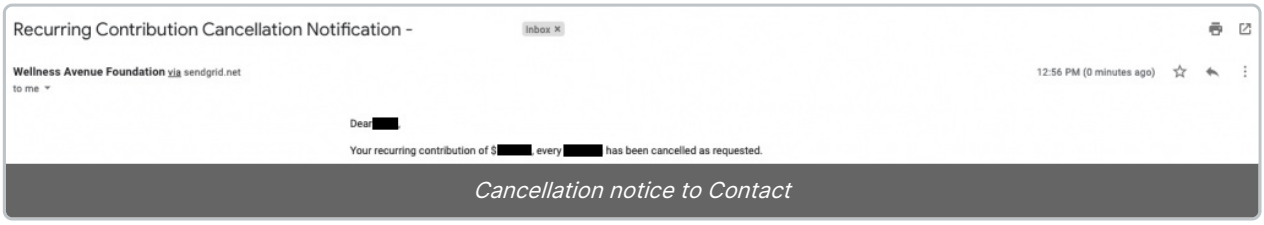
Cancel a recurring Contribution

3. In the popup window, you can (1) **add the *Cancellation Reason*** and also (2) **notify the Contact that the recurring donation has been cancelled**



Cancellation confirmation

4. **If you decide to notify the Contact of these changes** , they'll receive an email notification mentioning that their DMS Recurring Contribution was cancelled:



Cancellation notice to Contact